

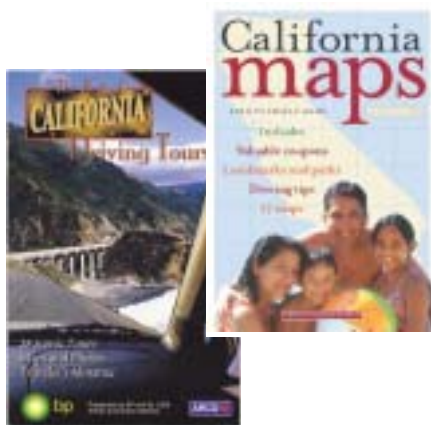
# INSIGHTS



California  
Tourism

In This Issue: Ad Campaign Update • Summer Travelers Take to The Road

## On The Road Again With California

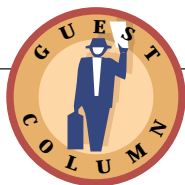


The sunny days of summer have arrived at last, and so have California's newest drive-inspired publications. *The Best of California Driving Tours* and *California Travel Map & Handbook Summer/Fall 2002* will have travelers revving up their engines and shifting into high gear as they navigate California's highways, byways and back roads. Once off the road, the handy guides make it easy to explore and locate nearby attractions.

*The Best of California Driving Tours* are calling you! Fill the gas tank; pack up your favorite road machine; roll down the windows for the dog; set the cruise

control and get ready to drive California! With 28 distinct driving tours we'll have you steering a course from mountains to ocean, border-to-border, and all points in between. Newly revised, this edition includes four new tours featuring major urban destinations: San Francisco, Los Angeles, Orange County, and San Francisco. Produced by California Tourism and K2 Communications, the guide is a companion piece for "The Best of California" television series currently airing in several major California television markets. Sponsored by BP, California State Parks, and the Bureau of Automotive Repair, 500,000 copies will be distributed by California Tourism,

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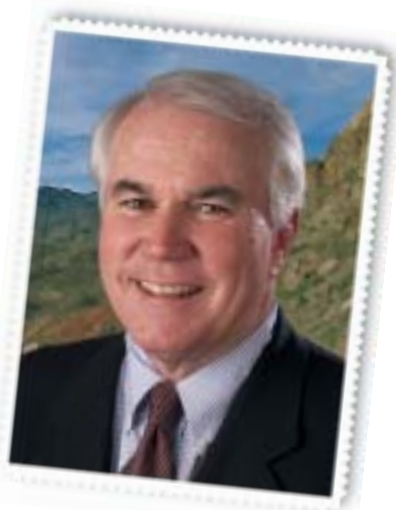


## New Ballparks a Big Hit For Communities

by Patrick J. Gallagher,  
President, San Francisco Giants Enterprises

The big splash in San Francisco Bay is not only from Barry Bonds' home runs being driven with regularity into the water, but also from the impact the waterfront ballpark, Pacific Bell Park, is having on the city's hospitality industry.

The distinctive brick and steel park, reminiscent of classic American ballparks like Chicago's Wrigley Field and Boston's Fenway Park, was built to house the San Francisco Giants and to replace windy Candlestick Park, where the team



struggled to draw fans for 40 years. Surprisingly, the importance of the park to the city has grown far beyond its intended single purpose of presenting Major League baseball games. In its third year of operation, it has become the most sought after new gathering place in the Bay Area for a vast number of special events and

alternative uses, none of which the park was originally designed to accommodate. Pacific Bell Park has averaged more than 100 such uses a year, ranging from high-end candlelit dinners in the dugout for 20 guests, to football games and sold out concerts with top headliners.

John Marks, president of the San Francisco Convention and Visitors Bureau puts it this way, "Pacific Bell Park and the Giants definitely have "major league" impact for us as we market San Francisco nationally and internationally. The exposure for the city on television and in other media is invaluable. It gives us a compelling new way to help sell the city. One example is the inaugural San Francisco Bowl, a new college football game set for New Year's Eve at the park which will potentially bring 40,000 people into the city during our slowest period." Organizers are working to tie the game and its ancillary activities into a

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by Caroline Beteta, Executive Director  
California Travel and Tourism Commission

## Stepping Up Communications – Reaching Out

**M**aking every dollar count is now more important than ever. Given that, the California Travel and Tourism Commission (CTTC) has begun a new communications effort to get the word out about the value-oriented and highly-leveraged cooperative marketing opportunities available, in addition to other advertising/branding efforts working to promote California as a premier travel destination.

This communications effort is intended to keep you, California Tourism's valued industry partners, connected and informed about all the tourism marketing activities not to be missed!

### New Regional Marketing Representatives

After conducting focus group research and receiving additional feedback from the travel industry, it was determined that the most productive and helpful way to advise industry partners about California Tourism's marketing programs and partnership opportunities was one-on-one or small group meetings. To accomplish this task, which means reaching more than 9,000 contacts as part of the assessed business community alone, the CTTC has retained five part-time regional marketing representatives. Located in the field, these marketing representatives' main objectives are to establish a personal rapport with all assessed businesses within their assigned regions, and to communicate details of California Tourism's existing programs and opportunities.



Toward that goal, these representatives are arranging one-on-one and small group meetings, attending travel industry functions, making small presentations, and responding via phone, e-mail and in person to industry questions about California Tourism's activities. Establishing contact with your local representative is as easy as an e-mail or phone call to the individuals listed below:

### New CTTC Newsletter

Supporting the regional representatives and overall communications effort is a new newsletter produced by the CTTC that will be issued every six to eight weeks. The newsletter is designed to regularly update the industry about ongoing cooperative marketing opportunities in a timely, "Kiplinger-style" news format. This CTTC Newsletter will complement California Tourism's feature publication, *Insights*, which is issued quarterly. Our long-term goal for the CTTC Newsletter is to distribute it via e-mail, so don't miss out. Be sure to provide your e-mail address to your regional representative immediately.



### CTTC Marketing Representatives

Region*	Representative	Contact Information
All Regions	Jennifer Jasper	<a href="mailto:jjasper@cttc1.com">jjasper@cttc1.com</a> (916) 447-0981
Ventura, Los Angeles and Orange County	Bob Amano	<a href="mailto:bobamano@sbcglobal.net">bobamano@sbcglobal.net</a> (626) 698-6044
San Francisco, Marin, Napa and Sonoma County	Jason Pacheco	<a href="mailto:jaspac@pacbell.net">jaspac@pacbell.net</a> (707) 224-9007
Northern & Central California Region	Shellie Cook	<a href="mailto:skcook@pacbell.net">skcook@pacbell.net</a> (916) 933-2433
Bay Area & Central Coast Region	Jean Johnstone	<a href="mailto:jeanej368@earthlink.net">jeanej368@earthlink.net</a> (510) 652-3294
Northern & Southern California Mountain Region	Pettit Gilwee	<a href="mailto:pettit@gilweepr.com">pettit@gilweepr.com</a> (530) 583-2138

(\* Note: These designations are for outreach purposes to the assessed business community, and do not replace the established 12 California Tourism regions used for most marketing purposes. If you have questions, and do not see your area listed above, please contact our statewide representative, Jennifer Jasper.)



## Meet Your Commissioners – New Pre-Commission Meeting Receptions

In an effort to provide for broader industry input for the marketing program and connect personally with each of the 33 Commissioners representing specific industry interests, the CTTC is initiating pre-Commission meeting receptions the evening prior to all Commission meetings. The CTTC meets three times a year at various locations around the state, thereby providing all businesses an opportunity to participate when a meeting is scheduled in their respective area. These receptions will also offer a prime opportunity to meet key California Tourism staff and learn first-hand about taking advantage of marketing opportunities for a variety of programs. For those of you located in the Desert/Inland Empire region, save the evening of October 16, 2002 for our next Pre-Commission Meeting/Industry Outreach Reception.

## Coming Soon...Updated Video About California Tourism/CTTC

The CTTC staff is working on an updated video detailing economic impact figures, California travel trends and volume, program effectiveness, and ongoing marketing activities and partnership

opportunities. We expect the video to be a valuable tool at tourism industry functions, conferences, and also within individual travel companies. Once the video is completed, information on how to obtain a copy will be included within the CTTC Newsletter.

## Get Connected – Get Involved

Through all of these new efforts, the CTTC and entire California Tourism organization intend to successfully keep all interested tourism industry parties involved and connected with the program. In addition, complementary efforts already in place include the popular [visitcalifornia.com](http://visitcalifornia.com) Web site, ongoing speeches and presentations, distribution of all flagship communication vehicles, such as *Insights*, the *Official California Visitor Guide/Travel Planner* and the annual *Cooperative Opportunities Brochure*. ★

For more information on securing a marketing presentation for your area/organization, or to discover how your company can get more involved in California Tourism's programs, please contact Lisa Kruttschnitt, CTTC Public Affairs Director ([lkuttschnitt@cttc1.com](mailto:lkuttschnitt@cttc1.com) or 415-332-4450), or Jennifer Jasper, CTTC Deputy Director of Marketing & Industry Relations ([jjasper@cttc1.com](mailto:jjasper@cttc1.com) or 916-447-0981).

## Product Knowledge On Track

Several of California Tourism's international representatives participated in an educational tour of the High Sierra April 11-14, following the California Conference on Tourism. The intensive tour helped representatives expand their knowledge of Yosemite, Sequoia, and Kings Canyon National Parks, as well as other lesser-known destinations.



Pictured at the Yosemite Mountain Sugar Pine Railroad are (left to right): Birgitt Mein, public relations representative, Germany; Stefani Eggert, account manager, California Tourism, Germany; Phil Bloomfield, public relations representative, UK; Fred Sparksman, managing director, California Tourism, Australia; and Terry Selk, California Tourism's director of travel trade development.



California Tourism's Web site, [visitcalifornia.com](http://visitcalifornia.com), averaged 5.6 million hits\* per month for the period including March through May. Hits were down slightly over the previous quarter (1.6 %), but visitor sessions\*\* were up slightly (3.3 %). Compared to the same period last year, activity levels saw an increase of 25% for hits, and a decrease of 21% for visitor sessions.

Following are additional highlights for the period including March through May 2002.

🌞 **Unique Visitors Decrease.** During the reporting period, the site experienced an average of 90,905 unique visitors\*\*\* per month. This reflects a decrease of 9.7% from the previous quarter, and a decrease of 11.4% from the previous year during the same period. The average length of stay for users was close to nine minutes.

🌞 **Eight is Enough:** The average number of pages viewed per unique visitor is eight pages.

🌞 **Maps on Demand.** The most downloaded files on California Tourism's site were the following maps: entire state, San Francisco metro, Los Angeles-Orange Counties, San Francisco regional, Central Coast regional, Los Angeles regional. Close behind was the *Driving Tours Guide*, featuring a series of adventurous in-state escapes.

🌞 **Was it a typo?** The most unique word used to search for California Tourism's Web site was "californie" (a word made famous by the Beverly Hillbillies' theme song). Other search words of interest included Kalifornien (the German word for the Golden State), and [california.com](http://california.com) (an intuitive guess).

\* A hit is a count of all requests including HTML pages, and each image within that page.

\*\* A visitor session is the number of distinct people who visit the site. This is estimated by grouping together all hits from one Internet provider address, with no more than 30 minutes between each hit, into one user session.

\*\*\* Unique visitors are counted by using the visitor's IP address, domain name or cookie.



### **CTTC Commissioners and Marketing Committee Members**

As the finishing touches are put on the 2002-2003 California Tourism Marketing Plan (posted on the Internet at [visitcalifornia.com](http://visitcalifornia.com)), it is important to recognize the key contributors who advise on policy and content for California Tourism marketing programs. Three times

a year, the 32-member Marketing Committee meets to review the plan, provide input, and subsequently recommend to the Commission that the plan be approved. Immediately following, the full 33-member California Travel & Tourism Commission meets to review the Committee's recommendations, approve the marketing plan, and to direct CTTC activities.

### **California Travel & Tourism Commission**

CHAIR – Lon S. Hatamiya, Secretary, California Technology, Trade and Commerce Agency

#### **APPOINTED COMMISSIONERS BY REGION**

Deserts, Mike Fife\*, Palm Springs Desert Resorts Convention and Visitors Authority  
San Diego County, Vacancy  
Inland Empire, Ted Weggeland, Entrepreneurial Hospitality Corp.  
Orange County, Bill O'Connell, Stovall's Best Western  
Los Angeles County, Tadao Fujiwara, M.D.  
Central Coast, Ted Balestreri, Cannery Row Company  
High Sierra, Dennis Harmon\*, Heavenly Ski Resort  
San Francisco Bay Area, John Marks, San Francisco Convention and Visitors Bureau  
Gold Country, John Dunlap III\*, California Restaurant Association  
Central Valley, Vacancy  
Shasta Cascade, John Koeberer, California Parks Company  
North Coast, Vacancy

#### **ELECTED COMMISSIONERS BY INDUSTRY**

(Term expirations shown in parenthesis)

##### **Accommodations**

CTTC Vice Chair - Jim Abrams, California Hotel and Lodging Association (1/06)  
James J. Amorosa\*, Motel 6 & Studio 6 (1/04)  
Glyn Davies\*, Simpson House Inn (1/06)  
Mark Erskine\*, San Diego Marriott Hotel and Marina (1/06)  
Anne Evans, Evans Hotels (1/04)  
Michael Gelfand\*, Terra Vista Management (1/06)  
Charles Hays\*, Far Horizons 49er Village Resort (1/06)  
Greg Hendel, Best Western Palm Springs (1/06)  
Rick Lawrance, California Lodging Industry Association (1/06)  
Chris Middleton, American Hotels, Inc. (1/04)  
Gene Zanger\*, CASA de FRUTA (1/04)  
CTTC Chief Financial Officer - John Kautz, Murphy's Hotel (1/04)

##### **Restaurants and Retail**

Ted Burke\*, Shadowbrook Restaurant (1/06)  
Ric Service, Las Casuelas Terraza (1/04)  
Tom Voltin, SAKS Fifth Avenue (1/04)  
Bill Dombrowski, California Retailers Association (1/06)

##### **Attractions and Recreation**

Claire Bilby, Walt Disney Parks and Resorts (1/06)  
Larry Kurzweil, Universal Studios Hollywood (1/04)  
CTTC Vice Chair - Bob Roberts\*, California Ski Industry Association (1/06)

##### **Transportation and Travel Services**

Michael Gallagher\*, CityPass, Inc. (1/04)  
Anastasia K. Mann, The Corniche Group (1/04)  
Vacancy (1/04)  
Rita Vandergaw\*, Port of San Diego (1/06)  
Terry MacRae, Hornblower Cruises & Events (1/04)

\* These Commissioners also serve on the Marketing Committee.

### **Marketing Committee**

Brian Baker  
San Francisco Convention and Visitors Bureau

Brad Burlingame  
West Hollywood Convention and Visitors Bureau

Bev Moore  
Marina Del Rey Convention and Visitors Bureau

Brian Deckel  
Delaware North Park Services

Jerry Easley  
Holiday Inn Monrovia

Mark Feary  
Orange County Tourism Council

Rodney Fong  
The Wax Museum at Fisherman's Wharf

Jack Giacomini  
Hilton San Diego Mission Valley

Steve Hammond  
Sacramento Convention and Visitors Bureau

Cassandra Hazen  
California Association of Bed & Breakfast Inns

Carol Komatsuka  
Japanese American National Museum

Ed Litrenta  
Sea World San Diego

John McMahon  
California State Parks

Kathy Paver  
PIER 39

Burke Pease  
Monterey County Convention and Visitors Bureau

Rob Perlman  
Mammoth Mountain Ski Area

Christine Shimasaki  
San Diego Convention and Visitors Bureau

Don Skeoch  
Universal Studios Hollywood

Jenice Vandagriff  
Visalia Convention and Visitors Bureau

## Future Marketing and Commission Meetings

Upcoming meetings will take place in the Desert region (Indian Wells) on the following dates: Marketing Committee and Assessed Business Reception on October 16, CTTC Executive Committee and full Commission on October 17, 2002.

## In-State Marketing Plan Activity Update

Wrapping up the in-state campaign that began last fall is the "Best of California" television series and the California Lottery program.

- **"Best of California" Television Series:** This series of thirteen, 30-minute television programs commenced on March 30 and continues with new and encore programming this summer on major networks throughout California. These informative and entertaining programs present unique destinations and travel experiences as identified by *Sunset* magazine, and are intended generate travel by Californians to all areas of the state. Each episode is projected to reach approximately 800,000 California households per week.
- **California Lottery Program:** In June, the Lottery introduced "California Treasures," a new scratcher game that features images of California and promotes in-state travel at 17,000 lottery outlets. In addition, point-of-sale promotional materials feature California travel packages at 285 ARCO stations throughout the state (delivering over 10 million gross impressions). The [visitcalifornia.com](http://visitcalifornia.com) Web site is also visually prominent on these items.

## Domestic/International Marketing Update

- Planned on the domestic and international front is **The California Channel (TCC)**, an interactive television travel site dedicated to California that would begin as a Web-based program and eventually allow consumers to book travel products over their television sets by the expected completion time period in 2005/2006. TCC has the potential to market California tourism on a "24/7-basis" to more than

175 million homes worldwide that are projected to have access to the interactive technology by 2005/2006. Currently, a committee of Commissioners is working to guide development and funding issues.

- **The "Adventures in Wild California" IMAX film** continues to open worldwide, with two film and "Taste of California" premieres that took place in Washington D.C. and New York in June. Both events featured California cuisine and included a VIP reception for key tour operators, travel media and economic development partners. To date, the California IMAX film has played in more than 70 cities on five continents and has generated over 10 billion gross impressions on California.

## CTTC Educational Presentations

Since the last issue of *Insights*, the CTTC delivered educational presentations to the following groups: California Conference on Tourism in Sacramento; Hospitality Educators & Industry Institute Conference in Anaheim; Shasta Cascade Wonderland Association Conference in Redding; Hoteliers International of Los Angeles; Ventura Chamber of Commerce; and a variety of convention and visitor bureaus and their members across the state. Presentation topics included: the economic impact of tourism; California Tourism's competitive landscape among other national destinations; marketing shifts in response to September 11 and economic slowdown; a highlight of 2002 marketing programs, with emphasis on the advertising campaign; "Adventures in Wild California" IMAX film activities and the proposed California Channel venture; urban and rural tourism promotion; and cooperative opportunities to partner with the CTTC and California Tourism.

CTTC educational presentations, in partnership with tourism-related associations and CVB's across the state, are conducted on an ongoing basis. To discover how to secure a presentation for your area or organization, or to receive more information about the CTTC's marketing programs, please call (415) 332-4450. ★

# Los Angeles to Host NTA



Robert Holmes

For the first time in 25 years, the largest group/motorcoach travel conference in the U.S. will take place in the Golden State. Los Angeles will host the National Tour Association (NTA) annual convention November 8-13, 2002.

In conjunction with the convention, California Tourism will conduct seven familiarization tours for NTA before and after the event. Co-sponsored by Southwest Airlines, the itineraries will feature a number of destinations.

Tours taking place November 5-8, 2002 include *Coastal Splendor*, featuring Santa Barbara, Solvang San Luis Obispo, San Simeon, Oxnard and Ventura; *Steinbeck's California*, highlighting San Jose, Santa Cruz, Salinas, Monterey and Gilroy; *California Gold*, with visits to Oakland, San Francisco, Sacramento and the Gold Country; and *California's Natural Gems*, featuring Sequoia and Yosemite National Parks.

After the conference, the *Sierra Majesty* tour will showcase Mammoth Lakes and South Lake Tahoe; *San Diego Adventures* will spotlight North San Diego County and San Diego; and *Southern California Lifestyle* will feature Palm Springs and Anaheim.

In addition to familiarization tours, California Tourism has helped prepare a newsletter for NTA tour operators highlighting numerous tour products and theme ideas. *California Connection* — a grassroots marketing coalition — will also sponsor an event for VIP operators.

At least 2,500 group/motorcoach travel group leaders and buyers are expected to attend the conference. ★

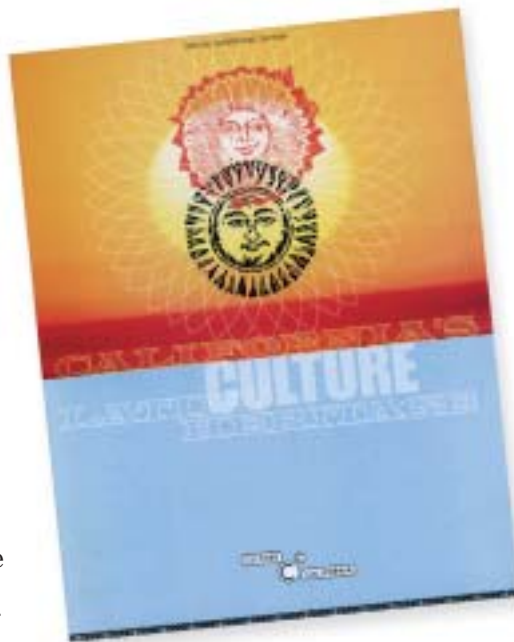


# Culture California Gives Reasons to Travel

**M**ore than 97 million travelers in the U.S. included cultural or historic activities in their itineraries last year. To address this important market, California Tourism has helped create *Culture California* — a program that showcases the Golden State as a premier cultural heritage destination.

Developed in partnership with the California Cultural Tourism Coalition, the program recently launched [www.culturecalifornia.com](http://www.culturecalifornia.com) — a Web site where travelers can learn more about cultural attributes by location (region or city) and by event. Browsers can pinpoint interests under such categories as: Visual Arts, Literary Arts, Science, Technology & Nature, Performing Arts, Cultural Communities, Design Arts, Music and more.

Linked to California Tourism's highly-visited Web site ([www.visitcalifornia.com](http://www.visitcalifornia.com)), the new site features search functions, interactive mapping and online application

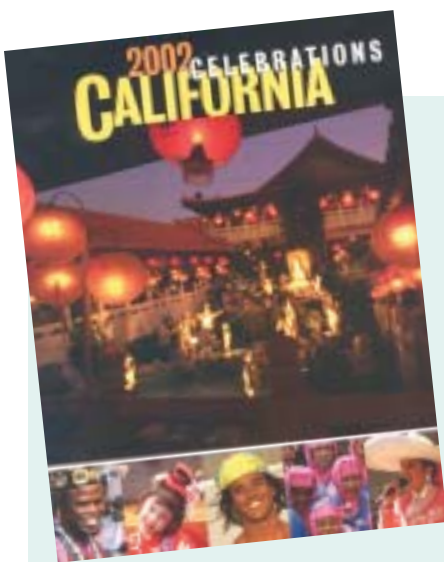


capabilities. Cultural destinations (such as museums, national parks, music venues, historic sites, and theaters) can submit an application and be placed on the site free simply by visiting [www.culturecalifornia.com](http://www.culturecalifornia.com). Once there, click on "add an event." Next, select "new partner," and fill out the online application form. That's all there is to it. New participants are added at the end of each month.

A colorful 16-page print piece was also created as an insert for the June 2002 issue of *Smithsonian* magazine. Additional copies are being included in California Tourism information packets while supplies last.

With plans to focus on a single ethnic culture each year, the program debuted with a celebration of California's Latino heritage. From art and architecture to the names of California's most populous cities, the contributions of the Latino community are woven into almost every segment of the state's history.

The California Cultural Tourism Coalition is comprised of: California Tourism; California Arts Council; California State Parks; Latino Arts Network; Los Angeles Convention and Visitors Bureau; Los Angeles County Arts Commission; Sacramento Metropolitan Arts Commission; San Diego Commission for Arts and Culture; San Diego Convention and Visitors Bureau; San Francisco Convention and Visitors Bureau; and San Francisco Grants for the Arts. ★



*California Tourism's annual event calendar is packed with events of interest to travelers.*

## Time to Nominate 2003 Events

**N**omination forms for *California Celebrations 2003*, California Tourism's special events calendar, were mailed in June to destination marketing organizations throughout the state. Each year, these organizations are asked to submit up to 10 nominations for events in their area.

From nominations submitted, more than 1,200 events are selected and compiled into a 48-page, four-color publication. *California Celebrations* is distributed in California Tourism's tourist information

packets, California Welcome Centers, foreign offices, consumer and trade shows, destination marketing organizations, and by tour operators and travel agents. Events listed are also posted on California Tourism's Web site ([www.visitcalifornia.com](http://www.visitcalifornia.com)) which receives millions of hits each month.

The deadline for submissions has been extended to August 16, 2002. For more information, please contact Megan Wright at (916) 322-3586.

# Gearing Up For World Travel Market

California Tourism is again coordinating the state's presence in London at World Travel Market (WTM) — the world's largest English-speaking travel trade exhibition. Taking place November 9-14, 2002, the program offers an outstanding opportunity to reach one of California's largest overseas markets.

Featuring a film theme, the California stand will offer delegates an individual work station along the stand's perimeter as well as access to shared interior meeting space. WTM makes its move this year from Earl's Court to Excel — a spectacular new venue — and the California stand commands a premier position within the USA Pavilion.

Providing even more opportunities to conduct business, the day prior to WTM California will host an exclusive movie premiere and luncheon for 125 top-producing UK tour operators and travel trade press. This annual VIP event, held at the prestigious British Academy of Film and Television Arts, provides California delegates with an extended opportunity to reach some of the market's most important contacts.

The new, lower registration fee of \$5,000 includes sponsorship of the movie premiere and luncheon, WTM exhibition space and shipping of materials from California.

For more information, or to register for World Travel Market, contact Terry Selk at (916) 322-0971 or [tselk@commerce.ca.gov](mailto:tselk@commerce.ca.gov). ★



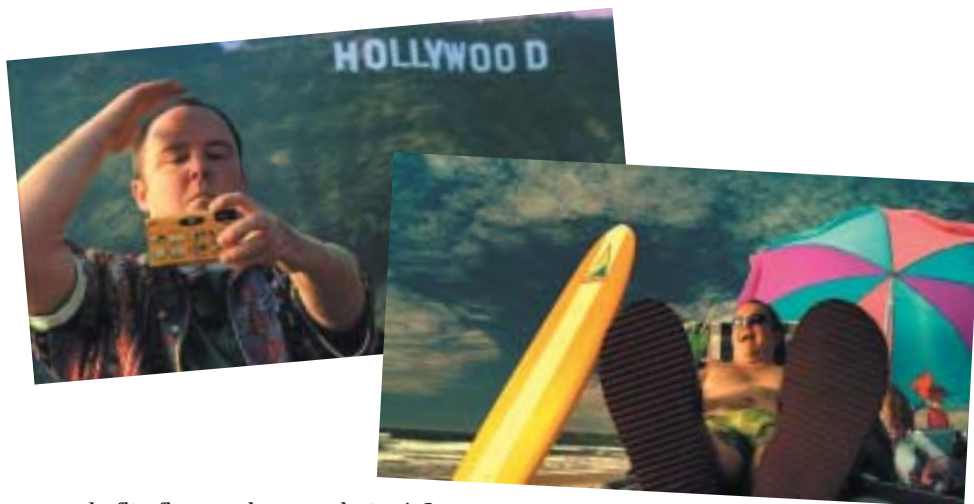
## New Resource for Meeting and Incentive Planners

California Tourism has launched a new Web site, [california4meetings.com](http://california4meetings.com), to help professional planners find the perfect meeting venue. The site brings together hotels and venues that cater to the meetings, incentive, conference and exhibition (MICE) market for one-stop online shopping.

Planners can deep search and instantly access multiple information fields for each featured property including pictures, printable maps and floor plans. Searches can be narrowed down to a finalist list, information transferred to a request for bids, and instantly e-mailed to chosen venues.

Launched in early July, the site provides benefits to destinations, hotels, inbound agencies and other services or products interested in reaching the meetings and incentive market. The helpful resource will soon be linked to California Tourism's main Web site for maximum exposure. Suppliers can register online at [california4meetings.com](http://california4meetings.com) or contact Terry Selk at (916) 322-0971. ★

## Quirky Doug Digs California



Holy flip flops and suntan lotion! Our quirky commercial talent, "Doug," is once again promoting the popular attributes of a Golden State vacation. During May and June, the offbeat 30-second television commercial ran in the key markets of Seattle, Portland, Phoenix and Las Vegas.

The lighthearted spot featured fabulously average vacationer, Doug — a slightly off-kilter fellow — originally introduced last summer. The ad centers around Doug's vacation experience as he visits landmarks, breathtaking landscapes, and the unique experiences that only California can provide. In his quest to experience the good life, he hits the beach

in Stinson, scopes out San Francisco in a cable car, pampers himself with a seaweed wrap and massage, and becomes a wine connoisseur. As his journey continues, Doug makes his way south to Los Angeles where he tries out the nightlife scene, then soaks up the desert sun at Joshua Tree. He concludes his tour with a visit to two of the state's most famous icons: the Golden Gate Bridge and the Hollywood sign. Overall, the spot projects a spontaneous and uninhibited invitation to visit the Golden State while showcasing California's diversity, environment and vast array of experiences. ★



Following is the latest news from California Tourism's travel trade and public relations representatives in Australia, Brazil, Germany, Japan, Mexico and the United Kingdom.

### Australia

Australia representative, Leeanne Dyer reports that during May and early June the Australian dollar made a strong recovery against the U.S. dollar. The gain is expected to increase in the immediate future. Interest rates have also risen by .25 percent, indicating a strong economy. Other positive economic signs include a forecasted 35 percent growth in residential construction by the end of the 2001/02 fiscal year, and a steady unemployment rate of 6.3 percent. In addition, recent American Express research indicated that Australian businesses are almost back to the same level of travel as pre-September 11. These indicators all underscore the continuing healthy environment for long-haul international travel.

In terms of booking trends, all U.S. wholesalers have advised that they have seen an increase in bookings to the U.S. in May, and are looking forward to this trend increasing if the exchange rate holds at its current level, or continues to increase. The majority of bookings that are being taken are for the short term, and California remained the strongest destination for the U.S.A.

Air New Zealand has announced that they will be increasing their trans-Pacific flights to five per week — not quite returning to their pre-September levels of daily Sydney to LAX flights. The airline was expecting to break even at the end of the fiscal year — a much better result than expected in January. Qantas has advised that they will be adding more flights to the U.S. in July while the load factor continued to remain high on the trans-Pacific route for both Qantas and United Airlines.

### Brazil

Newton Vieira, our Brazil representative, says the U.S. has lost its position as a leisure destination for Brazilians. Vieira says the inability of the U.S. to sell itself as a diverse destination has accompanied a slide to the bottom from which he anticipates it will take years to recover.

Brazilians, he says, have a perception that the U.S. is comprised of theme parks, shopping in Florida and New York, and Broadway shows. America is not generally remembered, he says, for other travel reasons — such as cultural or historic. Top destinations this year will be Europe and other Latin American countries.

On a brighter note, Vieira believes there is good potential for new destinations in the United States, and states such as California, if they are actively promoted. The future of the U.S. as a travel destination will depend on the ability of individual areas to promote themselves.

### Germany

From Frankfurt, representative Martin Walter indicates the German economy grew slightly in the first quarter after shrinking in the second half of last year. Rising unemployment eroded consumer spending while the gross domestic product shrank 0.3 percent from one year ago, but expanded from the final quarter of 2001 — indicating a lackluster recovery.

German bookings to the U.S. are gradually recovering from last year's slump, but prospects remain uncertain in 2002. Cheaper prices, late bookings and solid sales of modular holidays and premium offers are the main trends this year. Operators are now hoping for a pick up in 2003, but this will depend on the dollar exchange rate, world political situation and the German economy, according to a recent FVW USA/Canada destination report.

The German market for U.S. and Canada holidays has slumped dramatically over the last two years back to levels of the early 1990s. After strong growth in German visitors to the U.S. from 1 million at the start of the 1990s, to a peak of nearly 2 million in 1996 and 1997, the market dropped 10 percent to 1.78 million in 2000 and collapsed 24.6 percent to 1.5 million last year. Canada experienced a similar pattern over the last decade, peaking at 454,000 German visitors 1996. Sales for the U.S. have recovered slightly in recent weeks and months, but this will not be enough to compensate for the drop in winter sales due to September 11 events. The overall market is likely to fall significantly again this year, with forecasts ranging from a slight decrease to a slump of 33 percent or more.

German public relations representative, Birgit Meinz, reports 212 California-related media contacts from March through May. Highlights include assisting with press trips featuring Los Angeles, Santa Barbara, Pismo Beach, Carmel, Monterey, Yosemite, Lone Pine, Death Valley and San Francisco as well as issuing monthly press releases with California stories to more than 300 media in Germany. Publicity value generated for the three-month reporting period totaled \$1,290,664.

### Japan

Japan representative, Ko Ueno, says unemployment is increasing, but consumer prices are headed downward. A glimpse at consumer prices shows a trend of deflation, with overseas travel down in price by 0.8 percent.

According to the Japan National Tourist Organization, March overseas travel was down 10.8 percent over the previous year, marking seven consecutive months of double digit decreases since September. Although the numbers are still down, Ueno says the figures represent a recovery from hitting a bottom of -40 percent.

Booking trends are leaning toward last-minute departure, with almost half of bookings coming within one month of departure, making it difficult to forecast numbers. JTB's survey of Golden Week (April 25-May 5) travel trends revealed 509,000 Japanese had planned to travel overseas — down more than 4 percent from the previous year. Increases in travel to nearer destinations such as China, Taiwan, Malaysia and Korea is considered due to the opening of the new shorter runway at Narita Airport in April.

Other trends include a sharp decrease in senior age travelers applying for passports. According to the Ministry of Foreign Affairs' passport office, the largest decrease (-35.9 percent over the previous year) was for those in their 60s, followed by -34.1 percent for those in their 50s. The decline was also significant for those in their 70s and 80s. This decrease is in the same sector as those who had shown the fastest, largest growth of overseas travel in the past several years, representing more than 30 percent of overseas travel.

From Tokyo, public relations representative, Kazushi Namiki says the Japan office has handled 188 California-



related media inquiries from March through May. Namiki says the media's interest in the U.S. as a destination is returning and that the yen is starting to increase against the U.S. dollar — an encouraging factor for overseas tourism. Highlights include media coverage of California Travel Market, the Yappari California! recovery campaign, and assistance with a number of individual press trips.

The value of publicity generated in the three-month period exceeded \$368,000.

## Mexico

Francisco Caballero, of our Mexico office, reports that the dollar has climbed to its highest level in the last 26 months with 9.82 pesos = \$1 U.S. Mexico's Secretary of the Treasury says this should not be considered a sign of alarm for that country, as the exchange rate back in 1999 was 11 pesos = \$1 U.S.

California is still the number one destination for Mexican travelers due to ethnic links, flight frequencies, the variety of destinations and ideal climate conditions. Many Los Angeles (LAX), San Francisco (SFO) and San Jose (SJC) flights are booked for the season. Other strong competitors are Canada and Cuba — each with attractive prices and all-inclusive packages.

The airlines are predicting a moderate increase in sales for the vacation season compared to last year's as loads are quite high on the reduced number of flights that have been operating since September 11. Airline fares are not expected to increase this summer, but special fares for package tours have been raised anywhere from 10 to 12 percent.

Mexicana Airlines launched a Mexico City-Sacramento flight on July 1, 2002. The flight marked the first direct international service to or from California's capital.

## United Kingdom

From London, representative Andy Woodward indicates that UK interest rates have once again been held at 4 percent, extending a 38-year low on rates. The Bank of England is under pressure to increase rates while the level of consumer credit spending remains at an all time high. Inflation has stayed at 1.8 percent — the best record in the European Union.

The UK/U.S. exchange rate is at its highest level in more than 12 months. The exchange rate—currently £1 = \$1.46 U.S.— needs to surpass the \$1.50 mark for an increase in consumer confidence to once again see the U.S. as a value-for-the-money destination.

Summer bookings in the UK have stalled, with many operators reporting large numbers of charter holidays still to sell. At the end of May, winter bookings were down by 38 percent. The Jubilee and World Cup (and the national team's progress) could be blamed early in the season, but late June and early August will be crucial to major tour operators. This late booking behavior contradicts an earlier survey by [Cheapflights.com](http://Cheapflights.com) that indicated more than one in four UK vacationers would book this year's summer vacation earlier than usual.

On the airline front, as a sign that passenger numbers are recovering, Virgin Atlantic is recruiting for 300 positions after eliminating 1,300 jobs last fall. In March, American Airlines announced the resumption of 49 additional flights per week, departing from five UK airports to nine North American gateway cities for the summer 2002 season.

Phil Bloomfield, our UK public relations representative, says media coverage in the last quarter focused on short-haul destinations that can be reached cheaply and easily, and on short notice. Since several factors have contributed to late bookings, airline and package prices continue to be driven downward. Much of the travel coverage has therefore focused on showing how readers can benefit from this.

A group press tour featuring San Francisco and Sonoma County took place in May. With a food and drink theme, the itinerary featured San Francisco and Sonoma County. Co-sponsored by British Airways, the trip included representatives from *The Guardian*, *Daily Express*, and the Press Association.

During the reporting period, 261 press contacts were made by the London office while the value of publicity generated for California topped \$885,000. ★



As the summer travel season began, calls to California Tourism's toll-free number remained even with the previous quarter.

California Welcome Center visitation was strong with Barstow, Los Angeles, Oceanside and San Francisco each topping last year's visitation numbers over the same period.

Numbers below highlight program activities from March through May 2002.

<b>Calls to toll free telephone number</b>	17,321
<b>Packets ordered on Web site</b>	30,737
<b>Packets sent from fulfillment house</b>	
Domestic	30,450
Canadian	1,799
International	3,679
Trade	708
Student	6,101
<b>Informational calls to California Tourism</b>	1,552
<b>Packets sent from California Tourism</b>	
Domestic	789
Canadian	77
International	136
Trade	94
Student	83
<b>E-mails to CalTour@commerce.ca.gov</b>	1,570
<b>Assessment calls</b>	847
<b>International contacts</b>	
Australia (Consumer & Trade)	643
Brazil (Consumer & Trade)	1,492
Germany (Consumer & Trade)	2,212
Japan (Consumer & Trade)	2,407
UK (Consumer & Trade)	805
Division of Tourism (Trade)	6,260
<b>Research</b>	
Contacts	132
Reports mailed	239
<b>Media relations inquiries</b>	
California Tourism office	304
Overseas offices	661
<b>California Welcome Centers (walk-ins)</b>	
CWC, Anderson	8,448
CWC, Arcata	3,326
CWC, Barstow	18,289
CWC, Los Angeles	13,987
CWC, Merced	7,504
CWC, Oceanside	17,395
CWC, Rohnert Park	5,023
CWC, San Francisco	83,673
CWC, Santa Ana	16,600
CWC, Yucca Valley	2,934



## Historic Hotels Designations in Yosemite

Keith Walklet, Yosemite Concession Services



*The distinctive Ahwahnee is one of two Yosemite hotels officially recognized for historic integrity.*

Two landmark hotels in Yosemite National Park were recently accepted by the National Trust Historic Hotels of America, a program of the National Trust for Historic Preservation. The Ahwahnee and Wawona Hotel in Yosemite are among only 185 hotels and resorts throughout the country recognized by Historic Hotels of America for preserving and maintaining their historic integrity, architecture and ambiance. Considered one of the most distinctive resort hotels in North America, the Ahwahnee is renowned for its granite façade, massive stone hearths and richly colored Native American appointments. The Wawona, originally established in 1856 as a horse stage stop on the way to Yosemite Valley, consists of eight white Victorian-style buildings with wide-span verandas overlooking the forests.

## California – More “Superior Deluxe”

According to Hotel Online, an unbiased and comprehensive hotel directory, Official Hotel Guide (OHG), recently released its annual list of Superior Deluxe hotels. Only 101 hotels worldwide qualified for the exclusive classification in 2002, and among the distinguished properties, eight are located in the Golden State. OHG's picks include: The Ritz-Carlton Laguna Niguel (Dana Point); Hotel Bel-Air (Beverly Hills); The Peninsula Beverly Hills; The Beverly Hills Hotel; Four Seasons Hotel Los Angeles (Beverly Hills); Mandarin Oriental (San Francisco); The Renaissance Stanford Court Hotel (San Francisco); and The Ritz Carlton San Francisco. Two properties, The Beverly Hills Hotel, and the Four Seasons Hotel Los Angeles, earned Superior Deluxe status this year.



*The Beverly Hills Hotel is one of only 101 properties worldwide to be designated “superior deluxe” by OHG.*

## Silver Eagle For Heavenly

In May, Heavenly Ski Resort received the prestigious Silver Eagle Award in Environmental Excellence for its new \$23 million gondola. The low profile lift was designed to rise from the Stateline area nearly 3,000 feet above lake level to the heart of the mountain, with minimal visual and environmental disturbances. Established in 1993 by Mountain Sports Media, the Silver Eagle Awards recognize and encourage the environmental achievements of North American ski areas and resorts.

## 75 Years And Still Going Strong

The Shasta Cascade Wonderland Association (SCWA) was honored recently at the California Conference on Tourism for its 75 years of marketing Northern California. An achievement in itself, perhaps most amazing is that in all those years, the organization has only had three executive directors.

Begun in 1927 by Thomas L. Stanley, the organization was originally formed to lobby both state and federal governments for much needed infrastructure. John Reginato replaced Stanley in 1949 and spent the next 41 years developing a strong tourism and public relations program. In 1991, Bob Warren was hired to continue the organization's success. Since then, the Shasta Cascade Wonderland Association opened the California Welcome Center, Anderson in 1997. Here's to 75 more years of success!



*The Shasta Cascade Wonderland Association celebrates 75 years of tourism services. Pictured left to right are staff members Bob Warren, general manager; Christine Trafton, tourism information specialist; Jamie Rylands, tourism information specialist; and Karen Whitaker, tourism development manager.*

## Central Coast Spot at Top

San Luis Obispo County VCB



*Natural beauty and proximity to a wide variety of attractions put Morro Bay on Money magazine's list of best vacation spots.*

Spending time with family and rediscovering America is a high priority for travelers this summer, according to *Money* magazine. With that in mind, the publication selected ten *Best Places to Vacation 2002*. On the list is Estero Bay in Morro Bay, a spot the publication called quiet, peaceful, family friendly and convenient to historical attractions. To make the list, places had to feature spectacular natural beauty, but not be too isolated to offer a wide variety of attractions—including cultural events and restaurants.



## Summer Travelers Take to The Road



Californians and Americans are planning to make this the summer of the road trip. An estimated 62% of Californians say they are likely to take a driving vacation of more than 100 miles in California within the

remainder of 2002. Of those responding to the survey taken June 7 to 17, 38% said the increased inconvenience of air travel since September 11, 2001 has made them more inclined to plan a driving vacation in California.

According to the Travel Industry Association of America (TIA), nearly 70% of pleasure travelers who drove to their destination last summer plan to take the same amount of driving trips this summer. Twenty percent plan to travel more by car this summer compared to last. The reasons behind the preference for auto travel are a combination of economics, convenience, and the comfort and freedom of traveling by car. The Recreational Vehicle Industry Association reports that 75% of RV owners expect to travel more this summer than they did last year. Reservations for RV camping space this summer are 12% to 15% higher than last year. State Park campgrounds in California are experiencing a surge in reservations, with many places full each weekend through Labor Day.

Summer 2002 might also be termed the family summer. A strong increase in intentions to attend a family reunion (37% compared to 25% in 2001), as well as the choice of traveling companions, reflect the interest in connecting with

*continued on page 12*

### U.S. and California Travel Volume

	Dec. '01 (Millions of Person Trips)	Dec. '00	% Change
<b>Total US Travel</b>	<b>236.3</b>	<b>218.8</b>	<b>8.0%</b>
Business	51.0	48.0	6.3%
Leisure	185.3	170.8	8.5%
<b>Total Travel To and Through CA</b>	<b>28.9</b>	<b>27.1</b>	<b>6.7%</b>
Business	5.9	7.5	-22.3%
Leisure	23.0	19.6	17.8%
Residents	25.2	23.1	9.1%
Non-Residents	3.7	4.0	-7.8%
<b>Total Overnight Travel To and Through CA</b>	<b>12.9</b>	<b>11.3</b>	<b>14.6%</b>
Business	1.6	1.6	-0.9%
Leisure	11.3	9.7	17.2%
Residents	10.1	7.9	27.3%
Non-Residents	2.8	3.4	-16.3%

Source: D.K. Shifflet & Associates

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one's relatives. When asked whom they would be traveling with this summer, 55% of survey respondents said they will take their spouse, 31% are taking their children, and 21% are traveling with other family members. The most popular activity anticipated this summer is visiting friends and relatives (78%).

Other activities anticipated are going to a beach or lake (76%) and visiting a small town or rural area (67%). Interest in going to historic sites this summer jumped to 48% (up from 42% last year),

as did interest in outdoor activities such as climbing, hiking or camping (46% vs. 40% last summer). Visiting national parks or forests (53%), visiting museums (43%), attending performing arts events (40%), visiting theme parks (39%), fishing (38%) and attending cultural events (28%) are all on summer travelers' agendas. ★

Sources:

California Travel and Tourism Commission survey conducted by StrategyOne, June 2002; Travel Industry Association of America, May 2002; and California State Parks, June 2002.



### Comparison of State Park Attendance by Areas/Type of Parks

1998/99 fiscal year  
1999/00 fiscal year  
2000/01 fiscal year  
2001/02 fiscal year

Area/Type of Park	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.
Redwood Parks	848,154	275,515	247,856	556,463
	809,676	320,184	237,064	608,802
	948,643	325,064	256,660	637,411
	979,371	302,019	266,758	
Sacramento Area State Parks	307,076	248,655	341,821	703,508
	295,312	230,845	308,328	494,902
	336,372	305,720	290,407	464,515
	311,311	208,584	325,942	
Lake Tahoe Area	504,730	82,195	45,498	172,107
	544,178	134,454	52,947	201,332
	609,886	53,337	66,977	309,146
	619,517	105,423	53,914	
Gold Country State Parks	300,835	177,301	136,413	321,963
	240,801	163,945	128,063	329,091
	235,441	158,682	133,321	326,925
	274,281	247,318	179,003	
Santa Cruz - Monterey Area	722,295	647,237	795,100	1,033,170
	1,285,717	925,278	701,805	1,091,542
	1,379,006	1,091,621	860,197	1,122,992
	677,737	826,852		
San Francisco Area	1,273,219	473,498	618,301	1,393,020
	1,471,309	622,211	702,295	1,426,563
	1,257,251	761,258	616,507	1,393,093
	1,225,941	815,182		
Southern California Beaches	5,071,911	1,331,016	1,337,536	2,876,430
	5,753,449	2,198,426	1,762,522	3,618,737
	6,249,873	2,568,349	2,522,680	5,574,456
	7,559,921	2,748,779	2,732,597	
Desert State Parks	97,416	213,717	324,235	188,098
	84,511	223,883	289,977	187,571
	130,052	265,020	350,809	377,076
	110,515	281,816	400,900	

Source: California State Parks

## Boomers Go Exotic

After years of purchasing homes, cars, and college educations, the Baby Boom generation is ready to take those once-in-a-lifetime trips they have dreamed about. Peter Francese, founder of *American Demographics* magazine, forecasts some "very good years" for the unique vacation niche of the leisure travel industry.

The unique vacation to Incan ruins with an archeologist or to Florence with a medieval historian does not come cheap, Francese points out. The best candidates for such trips are found in households with high discretionary income and free time – the well-heeled Baby Boomers who have reached the 55-64 year old early retirement age. According to the Bureau of Labor Statistics' 2000 Consumer Expenditure Survey, households in that age bracket spend about \$17 billion a year on travel-related goods and services. The highest income level of this segment of the population, those earning \$100,000 per year or more, spends an average of more than \$6,000 a year on family trips.

Francese advises travel agents in search of new markets to focus on providing the older and more affluent travelers with what they want: unique and memorable experiences. ★

Excerpted from: "The Exotic Travel Boom," by Peter Francese, *American Demographics*, June 2002, p. 48-49.

# The Internet Comfort Factor

According to a Travel Industry Association of America (TIA) survey, 72% of U.S. travelers own a personal computer, and 31.1 million online travelers bought some type of travel products and services online in 2000.<sup>1</sup> These kinds of numbers are encouraging to travel industry businesses and destination marketing organizations that have Web sites. But, are the Internet users happy with the products and services they are receiving?

The 2002 National Leisure Travel Monitor produced by Yesawich, Pepperdine & Brown and Yankelovich Partners, Inc. (YP&B) delves into changes in consumers' perceptions of the all-pervasive worldwide Web, showing that the glow surrounding the Internet has dimmed. According to Dennis Marzella, Senior Vice President, Research and Strategic Marketing at Orlando-based YP&B, "Much to their disappointment, consumers have found that the Internet doesn't quite live up to their initial expectations for gaining even higher levels of control and efficiency through this new medium.

- 82% are disappointed with the lack of privacy at the Web sites they visit.
- 78% say it takes too long for images and information to fully appear on screen.
- 76% find the amount of advertising on the Web disappointing.
- 74% of online users find it hard to know if the information on the Internet is trustworthy.
- 68% have difficulty finding what they are looking for.
- 66% find little of the information really useful.
- 60% of online users believe that the Internet is not a safe place for kids."<sup>2</sup>

"When it comes to discussing a comfort level with using the Internet, leisure travelers who have made reservations online and through travel agents have some very interesting perceptions. Four in ten say the Internet is easier and faster than using a travel agent, whereas about the same proportion report it is about the same as using a travel agent. However, nearly one-quarter indicate that the Internet is more difficult and time-

consuming than a travel agent. This ratio tends to corroborate the disenchantment with the Internet among the overall population," Marzella said.

The YP&B study also examined the distribution options used by leisure travelers. "Ten percent use a travel agent, but do not use the Internet to obtain travel information or make travel reservations. Sixteen percent use a travel agent and the Internet. Forty percent use

the Internet only, and thirty-four percent do not use the Internet or a travel agent. Thus, today about one-third of the market deals directly with suppliers without utilizing the Internet or a travel agent," stated Marzella. ★

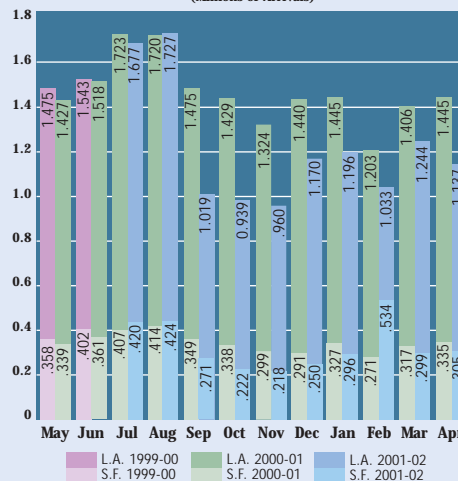
<sup>1</sup>The Historic/Cultural Traveler, 2001 Edition, Tourism Industry Association of America.

<sup>2</sup>YP&B/Yankelovich Partners 2002 National Leisure Travel Monitor, April 15, 2002.

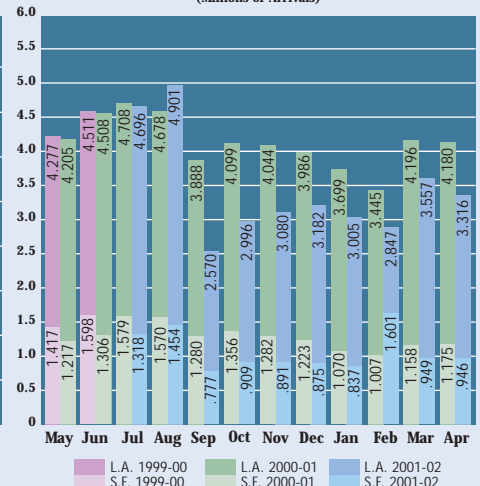


Sources: City of Los Angeles Dept. of Airports; SFO Bureau of Communications; San Diego Unified Port District Airport Operations Dept.; Oakland Airport Finance Office; Airport Finance and Administration, City of San Jose.

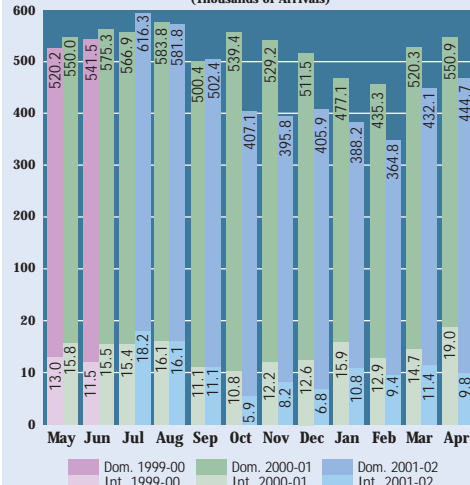
**International Air Arrivals**  
Los Angeles - San Francisco  
(Millions of Arrivals)



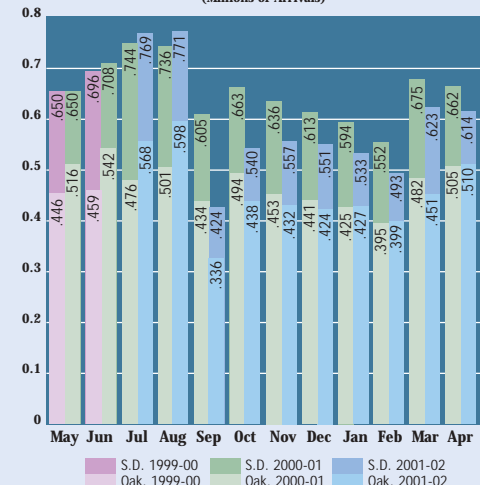
**Domestic Air Arrivals**  
Los Angeles - San Francisco  
(Millions of Arrivals)



**Domestic/International Air Arrivals**  
San Jose  
(Thousands of Arrivals)



**Domestic Air Arrivals**  
San Diego - Oakland  
(Millions of Arrivals)

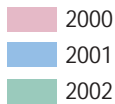




## National Park Attendance

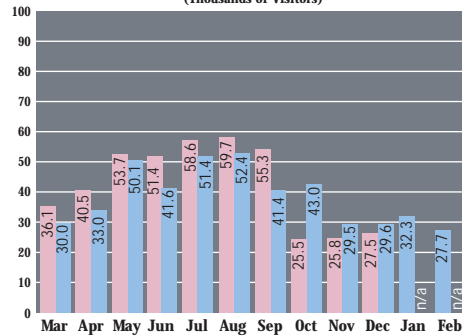
Source: National Park Service

### KEY



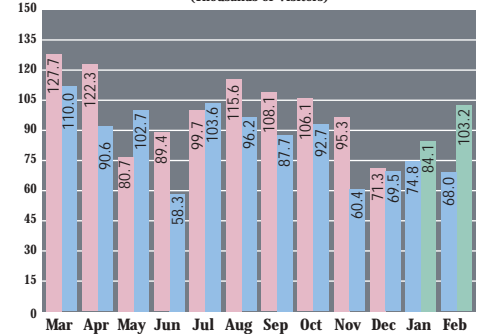
### Channel Islands National Park

(Thousands of Visitors)



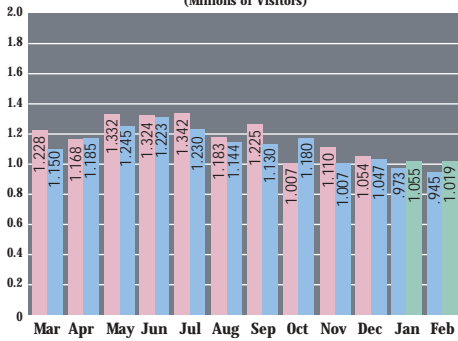
### Death Valley National Park

(Thousands of Visitors)



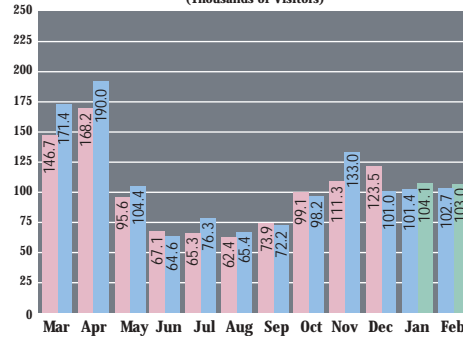
### Golden Gate National Recreation Area

(Millions of Visitors)



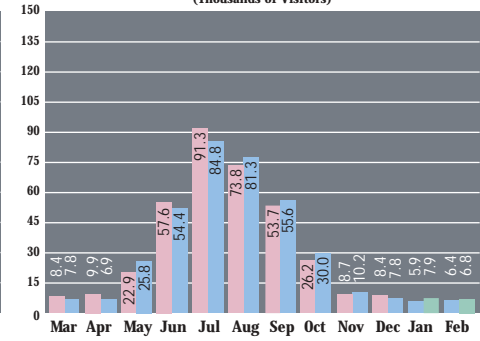
### Joshua Tree National Park

(Thousands of Visitors)



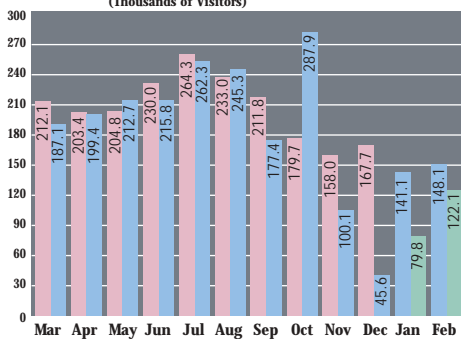
### Lassen Volcanic National Park

(Thousands of Visitors)



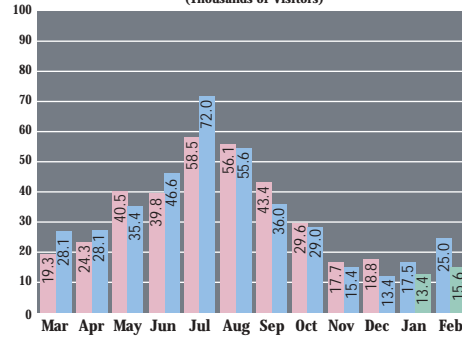
### Pt. Reyes National Seashore

(Thousands of Visitors)



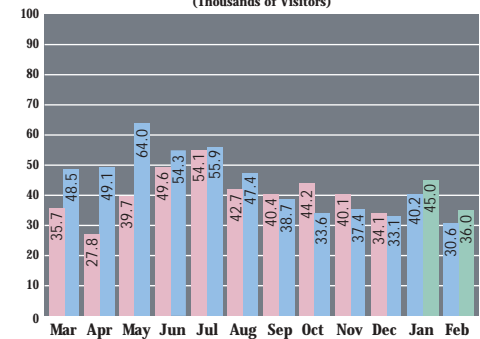
### Redwood National Park

(Thousands of Visitors)



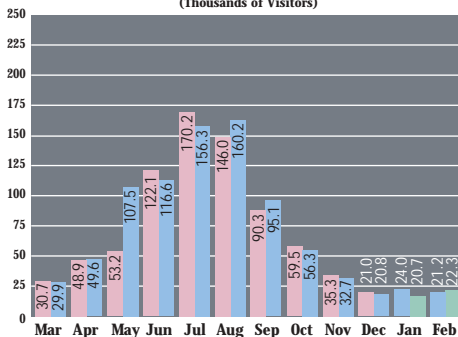
### Santa Monica National Recreation Area

(Thousands of Visitors)



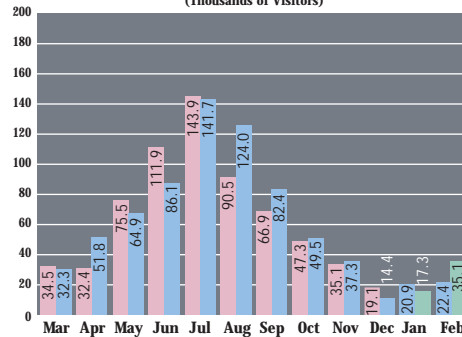
### Sequoia National Park

(Thousands of Visitors)



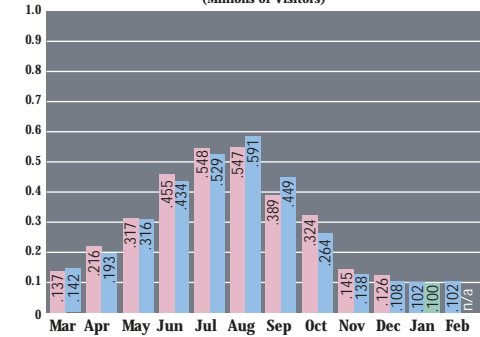
### Whiskeytown-Shasta-Trinity National Recreation Area

(Thousands of Visitors)



### Yosemite National Park

(Millions of Visitors)







## Tourism Intelligence International

### How Americans Will Travel 2007

The latest trends, data and essential information on the American travel market have been analyzed and compiled into this forecast from Tourism Intelligence International. The impact of 9/11, key drivers affecting the market, and strategies to target to draw travelers are all included. Cost: \$1,295.

For more information contact: Tourism Intelligence International, 50 Richmond Street, Port of Spain, Trinidad, West Indies. Web site: [www.tourism-intelligence.com](http://www.tourism-intelligence.com) Tel: (868) 624-4443; fax: (868) 625-4420 e-mail [futures@tstt.net.tt](mailto:futures@tstt.net.tt)

## Pacific Asia Tourism Association

### Pacific Asia Tourism Forecasts 2002-2004

Projected visitor arrival forecasts for 36 Pacific Asia countries through 2004. Normally available in April of each year, this edition will be released in July 2002 due to the impact of the events of the last quarter of 2001. Cost: Members \$350; Non-members \$499.

For more information contact: Patcharin Hongprapat, Membership and Publications, Pacific Asia Travel Association, Unit B1, 28th Floor, Siam Tower, 989 Rama I Road, Pathumwan, Bangkok 10330, Thailand. Tel: +66 (2) 658-2000, Fax: +66 (2) 658-2010, E-mail: [patcharin@pata.th.com](mailto:patcharin@pata.th.com)

## World Tourism Organization

### Ecotourism Market Reports

The World Tourism Organization has prepared a series of market reports on "ecotourism generating markets," including the U.S., Germany, United Kingdom, Canada, Spain, France and Italy. Each survey analyzes and evaluates the country's nature tourism and ecotourism markets, their volume, characteristics, major trends and development profiles.

Cost: €55 each or €300 for the set of seven reports.

## Tourism After 11 September 2001: Analysis, Remedial Actions and Prospects

This report is based on information received from official tourism institutions of many countries and territories around the world as well as from industry experts. Concludes with short-term prospects of tourism development until 2003, as well as long-term assessment of the impacts. Cost: €30

## Sport & Tourism

Transcripts of the speeches and studies prepared for the First World Conference on Sport and Tourism held in Barcelona in February 2001. Cost: €55

For more information contact: World Tourism Organization Infoshop – Capitan Haya 42, 28020 Madrid (Spain). Tel: +34 (91) 567 81 06, Fax: +34 (91) 571 37 33, E-mail: [infoshop@world-tourism.org](mailto:infoshop@world-tourism.org), Web site: [www.world-tourism.org/infoshop.htm](http://www.world-tourism.org/infoshop.htm)

# California Tourism Research & Statistics Available Online

The California Tourism Research Program continually posts new statistics on the California Tourism Web site. To access the latest domestic and international travel statistics go to [www.visitcalifornia.com](http://www.visitcalifornia.com), click on "Travel Industry," then click on "Research & Statistics." Bookmark this site and visit frequently to see what's new! ★

### California Welcome Centers (CWC) Percent Change in Number of Visitors

	May-02	May-01	% chg.	YTD '02	YTD '01	% chg.
CWC, Anderson	3,215	3,848	-16.5%	12,632	12,490	1.1%
CWC, Arcata	1,455	1,461	-0.4%	4,945	5,053	-2.1%
CWC, Barstow	7,304	6,271	16.5%	26,205	26,575	-1.4%
CWC, Los Angeles	5,206	1,348	286.2%	18,966	6,657	184.9%
CWC, Merced	2,462	2,881	-14.5%	11,746	12,951	-9.3%
CWC, Oceanside	5,569	4,197	32.7%	25,885	23,794	8.8%
CWC, PIER 39	29,708	29,270	1.5%	121,489	106,729	13.8%
CWC, Rohnert Park	2,751	1,548	77.7%	6,783	5,862	15.7%
CWC, Santa Ana*	5,127	n/a	n/a	26,060	n/a	n/a
CWC, Yucca Valley**	1,501	n/a	n/a	4,246	n/a	n/a

### California Visitor Centers Percent Change in Number of Visitors

	Apr-02	Apr-01	% chg.	YTD '02	YTD '01	% chg.
Death Valley	2,300	2,852	-19.4%	9,292	12,368	-24.9%
Los Angeles	3,648	6,674	-45.3%	16,459	27,844	-40.9%
Monterey	14,172	19,102	-25.8%	43,064	53,567	-19.6%
Sacramento	2,631	2,724	-3.4%	8,136	n/a	n/a
San Diego	3,273	3,539	-7.5%	12,730	13,991	-9.0%
San Francisco	29,214	61,178	-52.2%	96,535	152,011	-36.5%
Santa Barbara	21,623	20,023	8.0%	73,593	64,519	14.1%

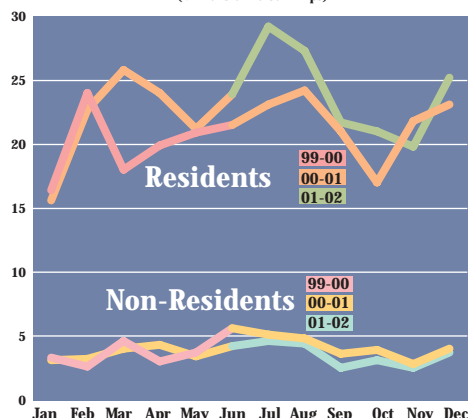
\* = opened November 29, 2001 \*\* = Official opening April 2002

Sources: Calif. Welcome Center, Anderson; Calif. Welcome Center, Arcata; Calif. Welcome Center, Barstow; Calif. Welcome Center, Beverley Center; Death Valley Chamber of Commerce; Los Angeles Convention & Visitors Bureau; Calif. Welcome Center, Merced; Monterey Peninsula Visitors & Convention Bureau; Calif. Welcome Center, Oceanside; Calif. Welcome Center, PIER 39; Calif. Welcome Center, Rohnert Park; Sacramento Convention & Visitors Bureau; San Diego Convention & Visitors Bureau; San Francisco Convention & Visitors Bureau; Calif. Welcome Center, Santa Ana; Santa Barbara Convention & Visitors Bureau; Calif. Welcome Center, Yucca Valley.

## Domestic Travel To And Through California

(Millions of Person Trips)

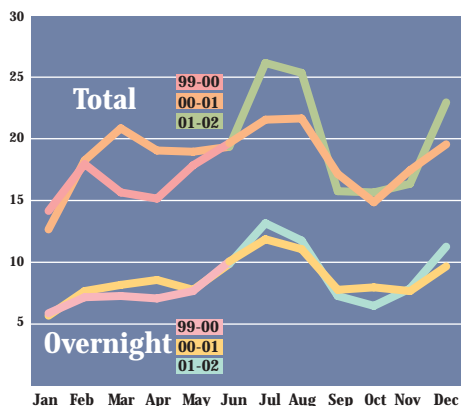
Source: D.K. Shifflet & Associates



## Domestic Leisure Travel To And Through California

(Millions of Person Trips)

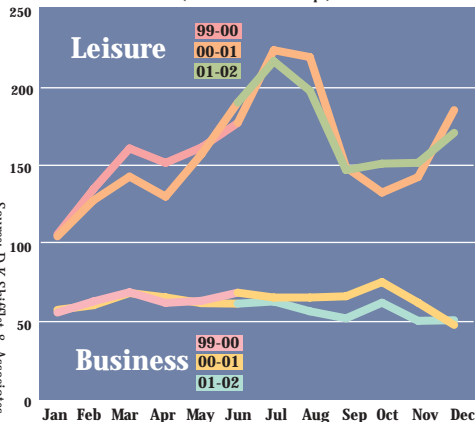
Source: D.K. Shifflet & Associates



## Domestic Travel To And Through the U.S.

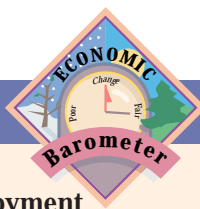
(Millions of Person Trips)

Source: D.K. Shifflet & Associates



Location	Month of April		April Year to Date	
	Occupancy % change 2001: 2002	Avg Room Rate % change 2001: 2002	Occupancy % change 2001: 2002	Avg Room Rate % change 2001: 2002
United States	-0.3%	-3.2%	-4.2%	-4.6%
Pacific	-3.5%	-5.1%	-7.7%	-6.7%
California	-4.7%	-4.6%	-8.3%	-7.3%
California North	-1.1%	1.3%	-1.9%	0.4%
California North Area	1.4%	0.4%	2.4%	2.4%
California North/Central	-7.5%	-11.7%	2.1%	-1.6%
California South/Central	-2.8%	4.6%	0.3%	2.3%
Anaheim-Santa Ana	-5.2%	0.0%	-9.4%	-3.7%
Bakersfield	-14.0%	2.6%	-6.5%	1.1%
Eureka/Crescent City	-9.9%	-2.5%	-9.7%	0.2%
Fresno	3.1%	5.9%	2.4%	2.5%
Inyo/Kings/Tulare	10.8%	4.1%	11.0%	2.6%
Los Angeles-Long Beach	-5.0%	-3.3%	-9.3%	-3.4%
Oakland	-9.7%	-8.8%	-16.3%	-9.6%
Oxnard/Ventura	2.6%	3.2%	-2.2%	2.1%
Palm Springs	-0.4%	-3.5%	-4.8%	-5.5%
Redding/Chico	4.1%	6.3%	7.2%	4.1%
Riverside-San Bernardino	-2.5%	2.1%	-1.9%	0.2%
Sacramento	-1.8%	0.4%	-4.0%	0.0%
Salinas/Monterey	-5.0%	-1.9%	-2.0%	-2.0%
San Diego	-4.2%	-2.7%	-7.8%	-3.1%
San Francisco/San Mateo	-7.6%	-10.1%	-17.1%	-16.1%
San Jose-Santa Cruz	-6.4%	-16.4%	-14.9%	-21.3%
San Luis Obispo	-5.9%	5.9%	2.9%	8.1%
Santa Barbara/Santa Maria	-2.1%	-1.6%	-1.2%	0.6%
Santa Rosa-Petaluma	-7.7%	3.1%	-13.9%	0.6%
Stockton Area	-4.8%	1.2%	-4.6%	-0.4%
Vallejo-Fairfield-Napa	0.7%	-0.2%	-1.6%	-0.9%

Source: Smith Travel Research, all rights reserved. Copyright 2002.



## Top Domestic Markets

Employment	% Change April 2001 to April 2002		
	April-02	April-01	% Difference
California	17,484,000	17,207,000	1.6%
Arizona	2,470,700	2,387,400	3.5%
Nevada	1,042,800	1,006,700	3.6%
Oregon	1,796,400	1,782,200	0.8%
Texas	10,600,200	10,355,500	2.4%
Washington	3,005,000	2,978,500	0.9%
Unemployment Rate	% Difference		
	April-02	April-01	% Difference
California	6.3%	4.8%	31.3%
Arizona	5.4%	3.8%	42.1%
Nevada	5.5%	4.8%	14.6%
Oregon	7.5%	5.8%	29.3%
Texas	5.6%	4.1%	36.6%
Washington	7.1%	6.0%	18.3%
Housing Starts (year to date)	% Difference		
	April-02	April-01	% Difference
California	47,314	48,854	-3.2%
Arizona	19,050	21,375	-10.9%
Nevada	10,479	14,122	-25.8%
Oregon	7,227	6,842	5.6%
Texas	51,240	49,347	3.8%
Washington	12,078	13,171	-8.3%

# Summer to Winter Forecast



Yosemite Concession Services Corporation

The Travel Industry Association of America forecasts total travel this summer to show a 2% increase over summer 2001. Travel spending is expected to fall slightly and remain below the summer 2000 level. Spending by international travelers is expected to increase faster than that of domestic travelers, but will not return to 2000's record levels until 2003.<sup>1</sup>

According to a Gallup poll conducted May 20-22, July 2002 will be the most popular month for travel this summer, followed by August, and then June and September.<sup>2</sup> Boston-based Torto Wheaton Research (TWR) and Atlanta-based The Hospitality Research Group (HRG), agree with the positive outlook for the third quarter months in terms of Revenue per Available Room (RevPAR). HRG/TWR forecasts RevPAR will show a positive turnaround in the third quarter of 2002 for full-service hotels in the Los Angeles and San Francisco markets, with recovery expected by the third quarter of 2003.<sup>3</sup>

The May 2002 *Travel Industry Indicators* predicts domestic hotel room demand as a whole in 2002 will be 1.5% above that in 2001, with domestic air travel 1.6% higher this year over last. International air travel is forecast to be 3.3% below that of 2001. Outbound overseas travel from the U.S. is projected to be -4.0% and inbound at -2.2% of 2001 levels.<sup>4</sup>

California travel is forecast to show steady increases through the remainder of 2002. A strong summer at 7% higher than summer 2001, will be followed by a positive fall season at nearly 5% higher than fall 2001 and an equally strong winter season, according to the most recent seasonal forecast from D.K. Shifflet & Associates.<sup>5</sup> These positive trends are supported by a strong leisure travel forecast for all three seasons, and equally strong resident total and overnight travel numbers. Business travel is expected to lag a small amount in the summer and fall, but to return stronger in the winter season. Both non-

resident total travel through California and overnight travel in the state is forecast to be up in summer and winter, and to remain steady in fall 2002 compared to the same seasons in 2001. ★

<sup>1</sup> "U.S. Travel Industry Performance Update #18," Travel Industry Association of America, June 17, 2002.

<sup>2</sup> Ibid.

<sup>3</sup> "Turnaround for Most major Hotel Markets to Commence in Third Quarter 2002", Hotel Online Special Report, June 17, 2002. [www.hotel-online.com](http://www.hotel-online.com).

<sup>4</sup> James V. Cammisa, Jr. *Travel Industry Indicators*, May 29, 2002.

<sup>5</sup> "California, Winter 2002 - Winter 2003 Topline Projections," D.K. Shifflet & Associates, June 28, 2002.

	Summer** 2002F	Summer** 2002F/01 % Chg.	Fall** 2002F	Fall** 2002F/01 % Chg.	Winter** 2002F	Winter** 2002F/01F % Chg.
<b>Total Travel to/through CA</b>	100.3	7.1%	74.0	4.7%	78.5	6.0%
Business	22.5	-0.7%	22.5	-1.2%	21.8	3.6%
Leisure	77.8	9.6%	51.5	7.6%	56.6	6.9%
Residents	86.7	7.7%	65.8	5.3%	67.6	6.5%
Non-Residents	13.7	4.0%	8.2	0.2%	10.6	2.6%
Average Expenditures* (ppd.)	\$79.10	2.1%	\$86.70	2.2%	\$81.30	2.2%
<b>Total Overnight Travel to and through CA</b>	47.1	5.8%	32.3	3.3%	32.6	4.5%
Business	9.7	1.0%	9.3	-2.1%	7.3	1.1%
Leisure	37.4	7.2%	23.0	5.8%	25.3	5.5%
Residents	34.7	6.7%	25.7	4.1%	23.6	5.4%
Non-Residents	12.4	3.9%	6.6	-0.1%	9.0	2.3%
Average Expenditures* (ppd.)	\$83.20	2.2%	\$92.00	2.1%	\$88.40	2.1%

F = forecast

All volume figures are in millions of Person-Trips. Expenditures are per person per day.

\* Excludes transportation expenditures.

\*\* Summer = June, July, August; Fall = September, October, November; Winter = December, January, February

This seasonal forecast from D.K. Shifflet & Associates reflects their enhanced seasonal forecasting method. The method, which is based on the ARIMA (Box-Jenkins) forecasting method, utilizes seasonal data from the past four years to advance the forecasting period through the present season and well into the future.





## California Tourism Order Form/Invoice

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The most frequently requested facts and figures on California tourism, statewide and regional.
- ☐ 2. **California Travel Impacts by County, 1992-2000** ..... ☐ One copy (FREE) ☐ \_\_\_ Add'l copies .....@ \$7.00ea.  
2000 expenditures, payroll, employment and tax receipts for every California County, plus preliminary  
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Profiles of the average visitor to California by county, includes trend numbers for 2000.
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Traveler and trip characteristics of key overseas markets. 75+ pages.
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## On The Road Again

continued from page 1

California Welcome Centers, visitor bureaus and chambers of commerce, California State Parks, Certified Folder Display Services, and most California AM/PM stations.

*The California Travel Map & Handbook Summer/Fall 2002* was released in June. The 32-page publication contains full-color driving, metro, and destination maps and offers a variety of detailed information in an easy-to-use size.

For ease-of-use, valuable sponsor coupons have been relocated to the center of the book. Other features include California Welcome Center information, a city index, mileage chart, driving regulations, and additional information for attractions, visitor bureaus, public land agencies, and road conditions. Produced bi-annually, the California Travel Map & Handbook has a circulation of 2 million and is available at agricultural border inspection stations and

California Welcome Centers, convention and visitor bureaus, and chambers of commerce.

Advertising revenues underwrite the cost of all California Travel & Tourism Publications. For questions regarding advertising, please contact: California Travel & Tourism Publications, 950 South Coast Drive, Suite #290, Costa Mesa, CA 92626; Telephone: (714) 424-1989. ★

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## New Ballparks *continued from page 1*

waterfront New Year's celebration for the out of town supporters of the teams and for locals.

While it is impressive that, through the first three years of operation, more than 9 million fans will have seen the Giants play at Pacific Bell Park, (top attendance in the National League), it is even more remarkable that the park buzzes with some special activity on most non-game days. New product launches, commercial shoots, job fairs, high profile society events, weddings, memorial services, company picnics, corporate team-building challenges, sales conferences, even legal arbitration hearings have been held in the park.

The San Francisco Archdiocese held their Jubilee 2000 Mass for more than 35,000 in the park. Last spring, the Dave Matthews Band played to more than 70,000 fans in back-to-back sold-out concerts. In November, the legendary Rolling Stones will play two sold out shows at the park. The highly acclaimed Cirque du Soleil will make its second extended performance run in the adjacent parking lot this fall. In January 2003, mountains of dirt and the big league motorcycle racing of Supercross will invade the park for the first time.

Gregg Perloff, President/CEO of Bill Graham Presents/Clear Channel Entertainment, coordinator of the Stones' performances says, "Pacific Bell Park not only allows for the highest quality assemblage for baseball, but also for concerts. The sightlines from everywhere are great, the bay views incredible, and the acoustics are perfect for concerts. What's not to like?"

Retro-style urban ballparks have sprung up in recent years in Baltimore, Cleveland, Denver, Houston, Pittsburgh, Milwaukee and Seattle. New, intimate, baseball-only

parks are also under construction or in the planning stages in San Diego and Philadelphia. These new parks have been the catalyst for economic and cultural activity in their cities, and have also been embraced by meeting planners, concert promoters and corporate event managers as an alternative to more conventional special events venues.

**"An economic study done by ERA Research in San Francisco estimated that the new ballpark meant more than \$125 million in new revenue to the city annually just from baseball games."**

An economic study done by ERA Research in San Francisco estimated that the new ballpark meant more than \$125 million in new revenue to the city annually just from baseball games. Ironically, these supposed single-use parks are proving to be more appealing for alternative uses than the larger, multi-purpose stadiums that proliferated in major American cities during the 60's and 70's. Some of the more entrepreneurial Major League teams have begun to respond to this demand by actively marketing their ballparks for non-baseball activities and other non-traditional uses that do not

conflict with baseball. While the objective is to keep the parks pristine for professional baseball, teams are finding there is a definite market for creative and profitable non-baseball uses as well.

Cities with new downtown ballparks have also enjoyed spectacular coverage on television during games showcasing the skyline in beauty shots of the parks in their urban setting. In San Francisco, blimp and remote camera shots of the flotilla of surfboards, kayaks and watercraft of all kinds crammed into "McCovey Cove" (named for the Giants Hall-of-Famer) outside Pacific Bell Park all hoping to retrieve one of Barry Bonds' historic home runs last summer were viewed on television and news media around the world. The arrival of nine-time Japanese Baseball All-Star outfielder, Tsuyoshi Shinjo, to the Giants this spring has not only created a buzz in the local Asian community, but also has resulted in regular coverage of Giants games and Pacific Bell Park in the Far East.

Perhaps comments from Toronto-based meeting planner, Marissa Nuss, best sum up the reaction from the special events community when she showed her long time event client Pacific Bell Park. "When my clients walked into the ballpark and onto the field," she says, "I didn't have to say anything; their stunned silence told me they were already sold." ★

# Coming Soon: CTM 2003

**R**egistration for the next California Travel Market (CTM) is just around the corner, and on the heels of last year's success, space is expected to fill quickly!

This year's event will take place February 16-20, 2002, and will allow buyers and press to experience the excitement and beauty of California from glamorous Hollywood to vibrant San Diego North. Suppliers will join the group in San Diego North for the main event.

Space will be limited, so watch the mail for registration forms, or visit the California Travel Industry Association (CalTIA) Web site at [www.caltia.com](http://www.caltia.com) for more information. ★

## Got a name or address change?

Just fax any changes to us at (916) 322-3402. Please include a copy of your current mailing label with any necessary corrections.



### August 2002

21-25	Association of Brazilian Travel Agents (ABAV)	Recife, Brazil
24-27	2002 Educational Seminar For State Travel Officials (ESTO)	Portland, OR

### September 2002

4-6	La Cumbre	Las Vegas, NV
24-26	Incentive Travel Meetings Exhibition (ITME)	Chicago, IL

### October 2002

9	10th International Gay & Lesbian World Travel Expo	San Francisco, CA
9-12	Travel Industry Association (TIA) Marketing Outlook Forum	Hollywood, FL
16	California Travel & Tourism Commission Marketing Committee Meeting	Desert Region TBA
17	California Travel & Tourism Commission Executive Committee Meeting General Commission Meeting	Desert Region TBA
27-Nov. 1	Society of American Travel Writers (SATW) Convention	Oahu

### November 2002

8-13	National Tour Association (NTA) Convention	Los Angeles, CA
8-14	World Travel Market (WTM)	London, England

## INSIGHTS

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Direct all inquiries and correspondence to:

**California Tourism**  
1102 Q Street, Suite 6000  
Sacramento, CA 95814  
Tel: (916) 322-2881  
Fax: (916) 322-3402  
E-mail address:  
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